

Section 5: Operation of Voting Systems

To conduct each election properly and efficiently, poll workers should understand the basic operation of the county voting system. Technology is continually evolving and equipment may change from one election to the next, so special attention should be paid to this aspect of training poll workers.

Standard Use Procedures and Troubleshooting

- As part of the Secretary of State's approval process, voting system manufacturers are required to create standard operating procedures – detailed instructions county elections officials and poll workers should follow when using a system.
- Poll workers should be encouraged to assemble, operate, and take down voting equipment prior to using it on Election Day.

Hands-On Training

- Hands-on training will reduce the number of problems on Election Day. The county elections official should determine which poll workers receive hands-on training with the voting system they will use on Election Day and how long the training should last, much of which will depend on the voting system's complexities and how long the system has been used in the county.
- If a voting system has more than one piece of equipment, poll workers should have hands-on training on each piece of equipment. Some voting systems may not require significant training time, and many returning poll workers may already be proficient in the operation of the system. Poll workers at locations using a different voting system for the first time should be given hands-on training. Role-playing is often an effective way to teach ways to correct common misunderstandings such as whether a battery is running low or the paper is jammed in a machine.
- Poll workers should receive hands-on training on how to set the machines up on Election Day and how to activate any special features for voters with disabilities. Poll workers should be familiar with common errors and receive hands-on training in how to correct those errors.

For example, if an optical scan ballot is rejected from a tabulator because it was overvoted, the poll worker should explain the problem to the voter and allow the voter to cast a new ballot if the voter wants one.

- Each poll worker should also understand the voter's perspective by walking through the process a voter would encounter at the polling place and be prepared to respond to common questions about the voting system. For example, the poll worker should be able to explain the meaning of an overvote when an optical scanner detects an overvote.

- Finally, poll workers should receive hands-on training on how to close the machines and tabulate votes cast after the polls close.

Written Guides

- Written materials are great tools for poll workers to use on Election Day.
- Poll worker training should include discussion of all written materials, procedures, and handouts that will be available to poll workers on Election Day. Training materials should clearly convey the purposes of all balloting systems. Poll workers should be aware that each polling place has different types of voting machines to, in part, offer greater accessibility for voters with disabilities and limited English proficiency. All systems make it possible for each voter to verify their ballot and make corrections if desired. Additional poll worker materials for troubleshooting should be part of the overall polling place documentation. Relevant sections of a voting system's adopted use procedures are often useful references, as well as any specific use conditions imposed by the Secretary of State.

Handling Problems

- Poll workers should have written instructions on how to troubleshoot common problems that might occur on Election Day. These should also be covered in hands-on training and exercises.
- Poll workers cannot be expected to fix the more technical or unusual problems that may occur with voting machines or systems. Therefore, training sessions should provide a clear direction on when and how to ask for help from the county elections office. It should be made clear to poll workers that they should immediately inform the county elections office of any unusual problems with a voting machine or system. Sometimes, trying to fix a problem without help from the county elections office can create more serious problems or consequences.